

LAST REVISED DATE: 05/01/2017

General Information

Task	Process Information
Running the Requisition Budgetary Activity Report	The Requisition Budgetary Activity Report provides budgetary amount information for requisitions according to report request parameters.

GEARS Navigation

Main Menu > Purchasing > Purchase Orders > Reports > Req and PO Budgetary Activity	
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1.0 Process

This document is intended to provide a quick reference to running the Requisition Budgetary Activity Report in GEARS.

STEP	ACTION	DETAILS
1.	<p>Create the Run Control ID. The first time you run the PO and Req Budgetary Activity Report, you must create a new Run Control ID. Click on the tab.</p> <p>NOTE: A Run Control ID is the name that will be given to the saved parameters you select for the report. You can run the same report again in the future by selecting the same Run Control ID when using the Find an Existing Value tab. No spaces are allowed in the Run Control ID. In addition, the report parameters for a Run Control ID can also be changed after selecting the ID.</p>	<p>Req and PO Budgetary Activity</p> <p> </p> <p>Run Control ID <input type="text"/></p> <p></p> <p>NOTE: To use a Run Control ID that you previously created, click the tab and then click the button. A list of Run Control IDs appear.</p>
2.	<p>Enter a Run Control ID. In this example, "REQACTIVITY" is used as the Run Control ID.</p>	<p>Run Control ID <input type="text" value="REQACTIVITY"/></p>
3.	<p>Click the button.</p>	

- 4.** Specify the Report Parameters. The **Report Selection Parameters** page displays. The report parameters determine what information appears in the report.

Notes: Fields with an asterisk (*) must be completed.

Req and PO Budgetary Activity

Run Control ID: REQACTIVITY Report Manager Process Monitor **Run**

Language: **English** ▼

Report Request Parameters

*Business Unit: MDJUD

*Budget Date From: 07/01/2016 *To: 06/30/2017

Remaining Amount: >= 0.000 USD

Business Unit GL: MDJUD

ChartField Sort Options Personalize | Find | View All | 1 of 1 First 1 of 1 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
PRODUCT	PCA	90001	90001

Save Add Update/Display

Report Request Parameters Fields	Description
Business Unit	Business Unit will always be MDJUD.
Budget Date From / To	Enter the budget period of the fiscal year (e.g., From: 07/01/XX/ To: 07/31/XX).
Remaining Amount	Enter the desired remaining amount. NOTE: (optional) use the dropdown box to limit results based on operator parameters (e.g., greater '>' /less '<' than or equal to '= ' a desired remaining amount).
Business Unit GL	Business GL Unit will always be MDJUD.

- 4a.** Specify ChartField Sort Options. Select the ChartField Sort Options Name criteria for your report (by a selection or range of selections you wish to be included in your report).

As an example, you can report on any single or combination of the following fields:

Account (e.g., 0902 – Office Supplies)

Product (PCA, e.g., 40821)

Budget Ref (Appropriation Year, e.g., AY2015)

Class Fld (Appropriation Number, e.g., A0006 – Admin Office of the Courts)

Fund Code (Fund, e.g., 0001 – General Fund)

Operating Unit (Batch Agency, e.g., C50 Maryland District Court)

Program (e.g., B005 – Maryland Judicial Conference)

Project ID (NOTE: this field is primarily used with Grants)

Req and PO Budgetary Activity

Run Control ID: REQACTIVITY Report Manager Process Monitor **Run**

Language: **English** ▼

Report Request Parameters

*Business Unit: MDJUD

*Budget Date From: 07/01/2016 *To: 06/30/2017

Remaining Amount: >= 0.000 USD

Business Unit GL: MDJUD

ChartField Sort Options Personalize | Find | View All | 1-2 of 2 First 1-2 of 2 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
PRODUCT	PCA	90001	90001
ACCOUNT	Account	0900	0902

Save Add Update/Display

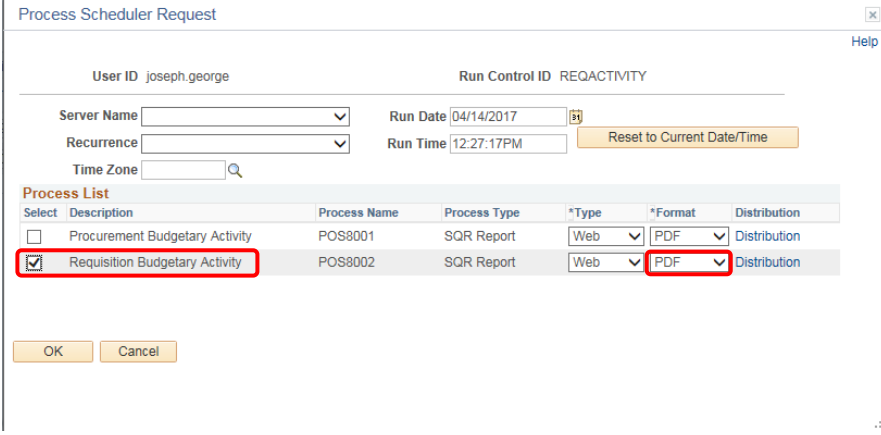
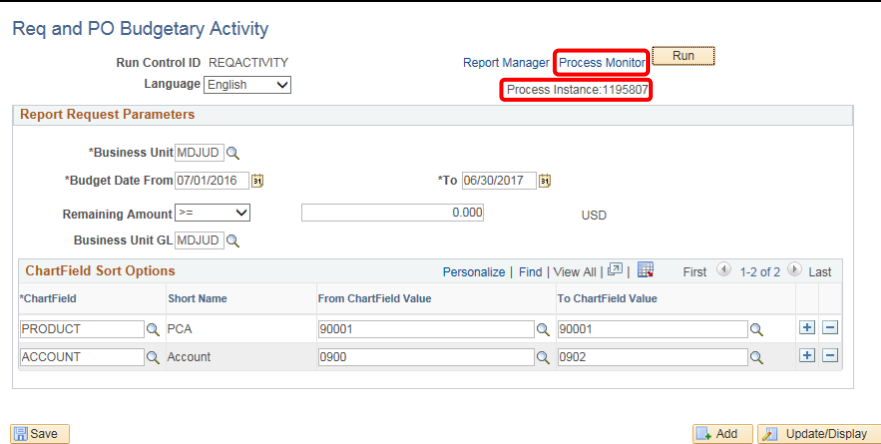

NOTE: The more selection criteria entered, the more granular your results will be. You can select multiple field names. Add/delete field names as needed by using the “+” and “-” buttons to the right of the line.

ChartField Sort Options Personalize | Find | View All | 1-2 of 2 First 1-2 of 2 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
PRODUCT	PCA	40821	40821
ACCOUNT	Account	0900	0902

Save Add Update/Display

- 5.** Run the Report. Click the **Run** button.

6.	<p>Schedule the Process. The Process Scheduler Request page displays.</p> <p>Select/Enter the appropriate criteria:</p> <p>a. Click the checkbox <input checked="" type="checkbox"/> next to the Procurement Budgetary Activity.</p> <p>b. Ensure the report Format is 'PDF'.</p>																									
7.	Click the OK button.																									
8.	<p>Make Sure The Process Runs. The Report Selection Parameters page displays.</p> <p>Make note of your Process Instance Number. In this example, the Process Instance Number is 1195807.</p> <p>Click the Process Monitor link.</p>																									
9.	<p>Check the Process Status. The Process List page displays.</p> <p>Click the Refresh button and continue clicking the <i>Refresh</i> button until the Run Status = Success and Distribution Status = Posted.</p>	 <table><thead><tr><th>Run Status</th><th>Description</th></tr></thead><tbody><tr><td>Queued</td><td>The process is waiting to run.</td></tr><tr><td>Initiated</td><td>The process has started.</td></tr><tr><td>Processing</td><td>The process is running.</td></tr><tr><td>No Success</td><td>The process did not run, call the Help Desk.</td></tr><tr><td>Warning</td><td>The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.</td></tr><tr><td>Success</td><td>The process ran successfully.</td></tr></tbody></table> <table><thead><tr><th>Distribution Status</th><th>Description</th></tr></thead><tbody><tr><td>Queued</td><td>The process is waiting to run.</td></tr><tr><td>NA</td><td>The process is still running.</td></tr><tr><td>Posted</td><td>The report has posted.</td></tr><tr><td>Not Posted</td><td>The report did not post, call the Help Desk.</td></tr></tbody></table>	Run Status	Description	Queued	The process is waiting to run.	Initiated	The process has started.	Processing	The process is running.	No Success	The process did not run, call the Help Desk.	Warning	The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.	Success	The process ran successfully.	Distribution Status	Description	Queued	The process is waiting to run.	NA	The process is still running.	Posted	The report has posted.	Not Posted	The report did not post, call the Help Desk.
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10.	<p>Retrieve the Report. Click the Go back to Req and PO Budgetary Activity link to return to the Report Selection Parameters page.</p>																									

11.	<p>The Req and PO Budgetary Activity page displays.</p> <p>Click the Report Manager link.</p>	<p>Req and PO Budgetary Activity</p> <p>Run Control ID REQACTIVITY Report Manager Process Monitor Run</p> <p>Language English</p> <hr/> <p>Report Request Parameters</p> <p>*Business Unit MDJUD</p> <p>*Budget Date From 07/01/2016 To 06/30/2017</p> <p>Remaining Amount >= 0.000 USD</p> <p>Business Unit GL MDJUD</p>																																																																																																			
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13.	<p>View the Report. The View Reports page displays.</p> <p>Click the link of the report you wish to view that corresponds to the Process Instance Number that was run.</p> <p>The report will open as a PDF file in a separate window. See below for sample output.</p>	<p>List Explorer Administration Archives</p> <p>View Reports For</p> <p>User ID Joseph.george x Type Last 1 Days Refresh</p> <p>Status Folder Instance to </p> <p>Report List Personalize Find View All 1-9 of 9 Last</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Report ID</th> <th>Prs Instance</th> <th>Description</th> <th>Request Date/Time</th> <th>Format</th> <th>Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1146519</td> <td>1195807</td> <td>Requisition Budgetary Activity</td> <td>04/14/2017 12:57:56PM</td> <td>Acrobat (*.pdf)</td> <td>Posted</td> <td>Details</td> </tr> </tbody> </table>	Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details	<input type="checkbox"/>	1146519	1195807	Requisition Budgetary Activity	04/14/2017 12:57:56PM	Acrobat (*.pdf)	Posted	Details																																																																																			
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14.	<p>Report ID: POS8002</p> <p>Business Unit: MDJUD Account From 0900 To 0902</p> <p>Budget Date From 01-JUL-2016 To 30-JUN-2017 Remaining Amount >= 0.00 PCA From 90001 To 90001</p> <p>PeopleSoft Purchasing REQUISITION BUDGETARY ACTIVITY REPORT</p> <p>Page No. 1 Run Date: 04/14/2017 Run Time: 12:58:06</p> <table border="1"> <thead> <tr> <th>REQ ID</th> <th>Line\Sched\Dist</th> <th>Original REQ Amount</th> <th>Liquidated Amount</th> <th>=</th> <th>Remaining Amount</th> <th>PO Amount</th> <th>Account</th> <th>PCA</th> </tr> </thead> <tbody> <tr> <td>0000005464</td> <td>10\1\1</td> <td>305.00</td> <td>305.00</td> <td></td> <td>0.00</td> <td>274.40</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000005519</td> <td>1\1\1</td> <td>2,616.72</td> <td>2,616.72</td> <td></td> <td>0.00</td> <td>2,616.72</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000005520</td> <td>10\1\1</td> <td>1,220.00</td> <td>1,220.00</td> <td></td> <td>0.00</td> <td>1,090.00</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000005520</td> <td>11\1\1</td> <td>1,220.00</td> <td>1,220.00</td> <td></td> <td>0.00</td> <td>1,091.60</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000005520</td> <td>17\1\1</td> <td>176.00</td> <td>176.00</td> <td></td> <td>0.00</td> <td>136.48</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000005520</td> <td>20\1\1</td> <td>60.00</td> <td>60.00</td> <td></td> <td>0.00</td> <td>44.40</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000005524</td> <td>10\1\1</td> <td>732.00</td> <td>732.00</td> <td></td> <td>0.00</td> <td>654.00</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000005524</td> <td>11\1\1</td> <td>732.00</td> <td>732.00</td> <td></td> <td>0.00</td> <td>654.96</td> <td>0902</td> <td>90001</td> </tr> <tr> <td>0000006053</td> <td>1\1\1</td> <td>100.00</td> <td>100.00</td> <td></td> <td>0.00</td> <td>100.00</td> <td>0902</td> <td>90001</td> </tr> <tr> <td colspan="2">Totals:</td> <td>7,161.72</td> <td>7,161.72</td> <td></td> <td>0.00</td> <td>6,662.56</td> <td></td> <td></td> </tr> </tbody> </table>		REQ ID	Line\Sched\Dist	Original REQ Amount	Liquidated Amount	=	Remaining Amount	PO Amount	Account	PCA	0000005464	10\1\1	305.00	305.00		0.00	274.40	0902	90001	0000005519	1\1\1	2,616.72	2,616.72		0.00	2,616.72	0902	90001	0000005520	10\1\1	1,220.00	1,220.00		0.00	1,090.00	0902	90001	0000005520	11\1\1	1,220.00	1,220.00		0.00	1,091.60	0902	90001	0000005520	17\1\1	176.00	176.00		0.00	136.48	0902	90001	0000005520	20\1\1	60.00	60.00		0.00	44.40	0902	90001	0000005524	10\1\1	732.00	732.00		0.00	654.00	0902	90001	0000005524	11\1\1	732.00	732.00		0.00	654.96	0902	90001	0000006053	1\1\1	100.00	100.00		0.00	100.00	0902	90001	Totals:		7,161.72	7,161.72		0.00	6,662.56		
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End of Document

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